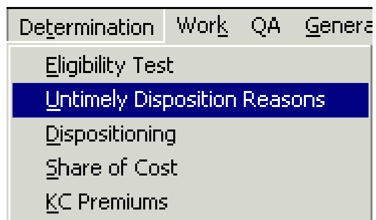
Dispositioning

1. Introduction

While ACE has the ability to run pre-tests on incomplete or unverified information, an approval for benefits cannot be made until all required data is gathered and verified. The tests run using the income and demographic data entered into the system. The results of the eligibility tests will display all of the programs for which the applicant has applied.

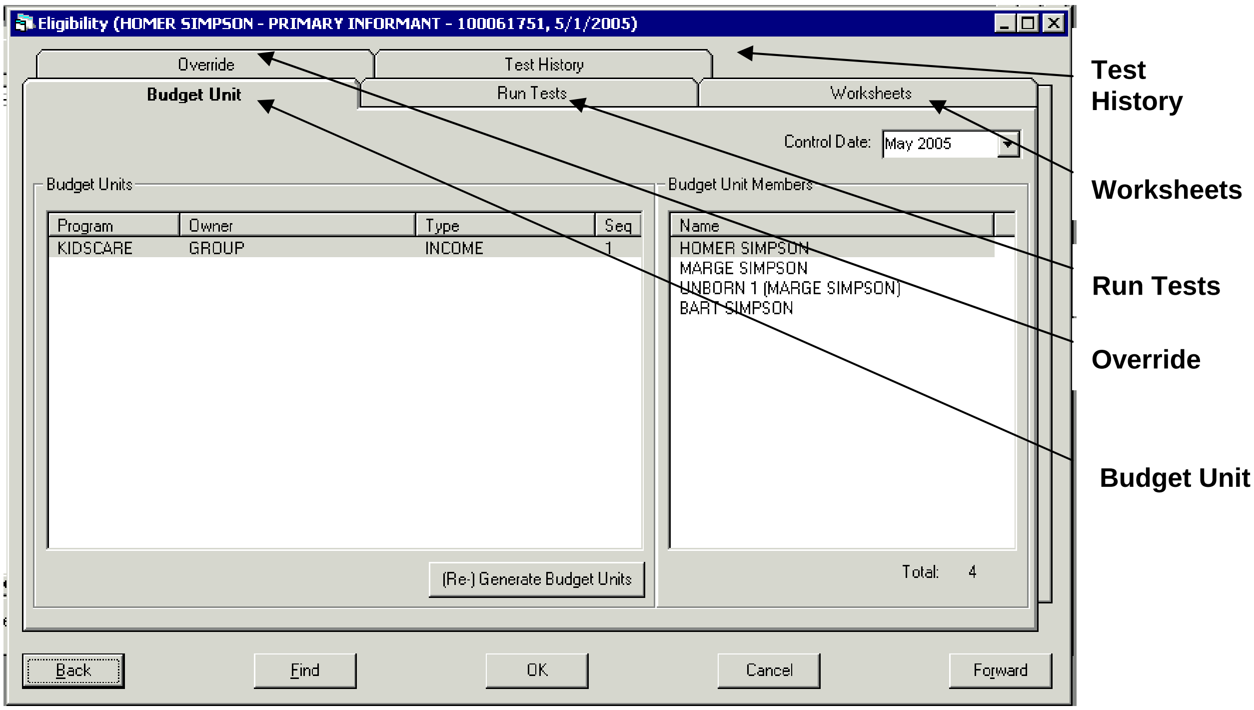
To access the **"Eligibility"** window on the main menu, click **"Determination"**. On the drop down menu, select **"Eligibility Test"**.



ACE automatically performs prospective budgeting. For example, if a customer applies for KidsCare in January (the initial control date) and you complete the approval disposition in the first week of February, ACE will automatically approve KidsCare for March.

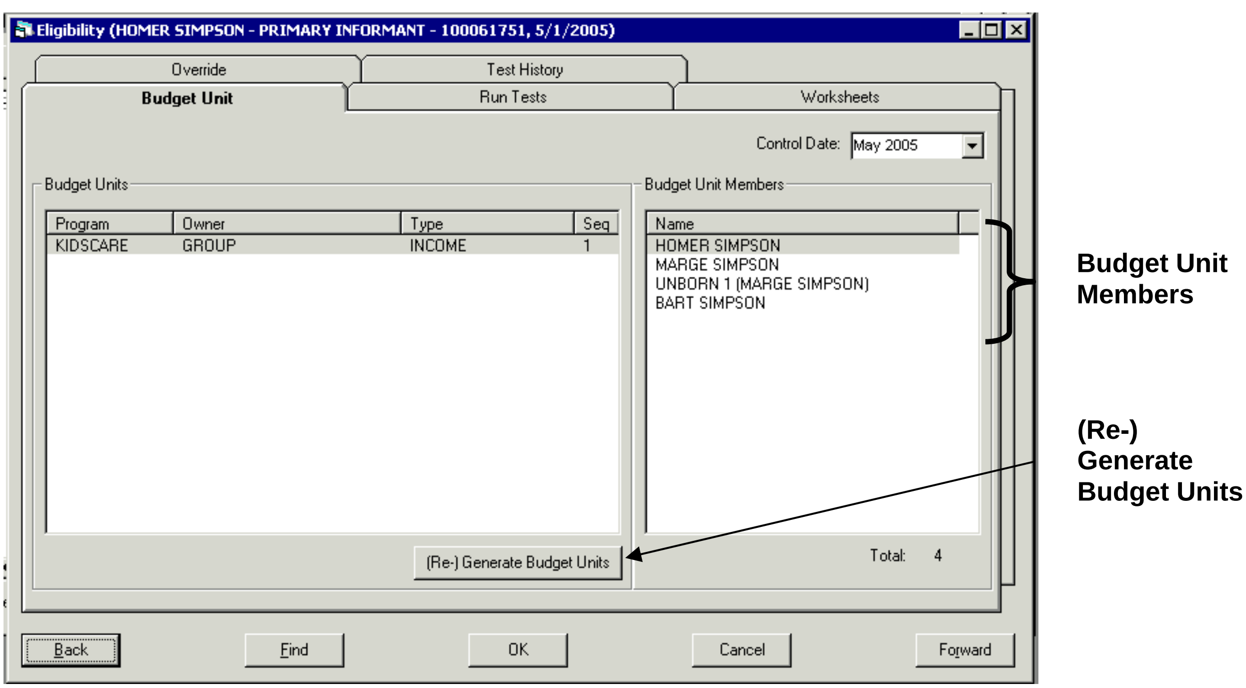
The **"Eligibility"** window has five tabs.

- **Budget Unit**
- **Run Tests**
- **Worksheets**
- **Override**
- **Test History**



2. Budget Unit

The **"Budget Unit"** tab is used to identify the members of the KidsCare income group. ACE automatically generates the budget unit based on the information on the **"Relationship"** tab.



!	If the KidsCare Budget Unit is incorrect, it must be corrected on the **"Relationship"** tab. After the KidsCare Budget Unit has been corrected,

	regenerate the KidsCare Budget Unit to assure that your budget unit is correct.

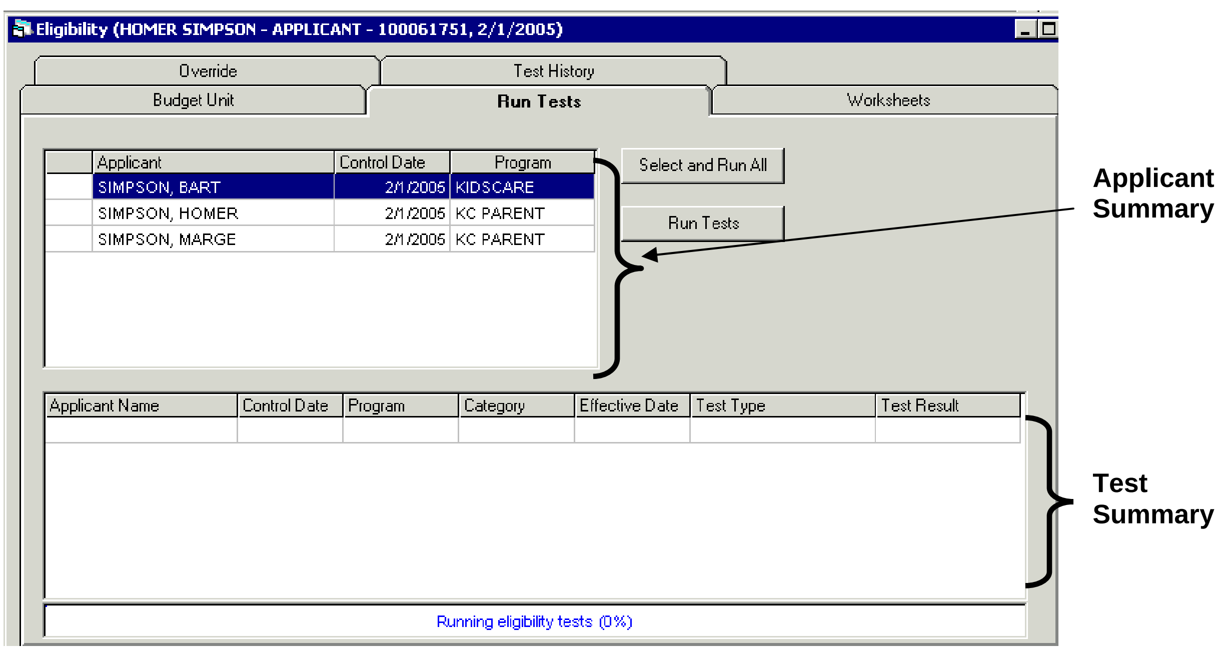
When you have reviewed budget unit information and it is correct, click on the **“Forward”** button to continue to the next tab, **“Run Tests”**.

3. Run Tests

The **“Run Tests”** tab performs the eligibility tests for all applicants. ACE defaults to the program under which the application is registered.

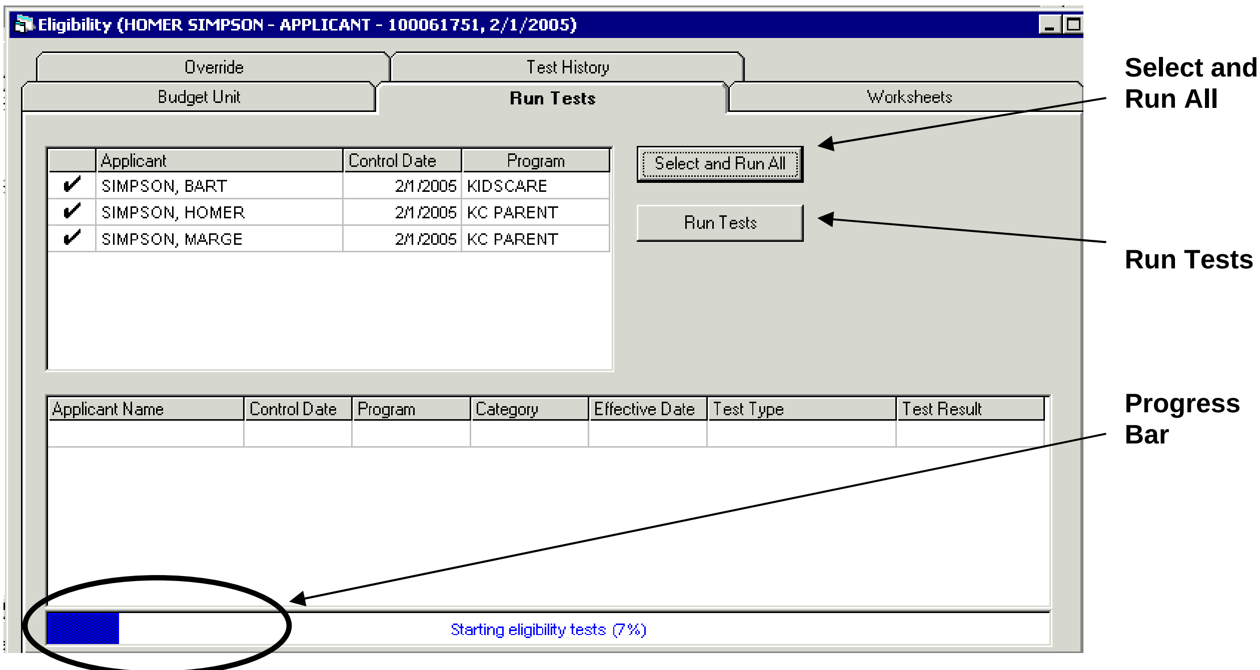
There are two grids on this tab.

Applicant Summary	Displays all the applicants in the household, the Control Date and Program for each applicant.
Test summary	Displays the information selected in the previous fields plus the Test Results.



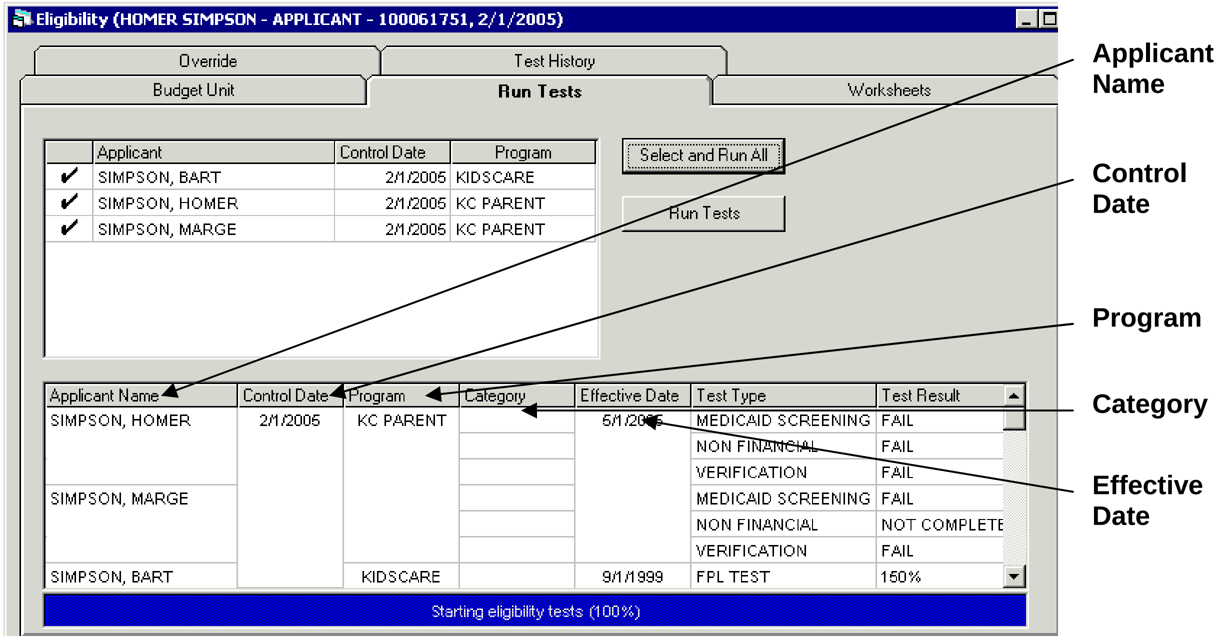
To run the test for the all applicant’s, click on the **“Select and Run All”** button. If you only want to run tests on certain applicant’s, check the box next to their names and click on the **“Run Tests”** button.

Once you click on the **“Select and Run All”** or **“Run Tests”** button, the information selected in the above fields will display in the **“Tests Summary”**. When ACE is in the process of running the tests, there is a progress bar at the bottom of the **“Tests Summary”** field. The line continues across the field until all tests are completed.



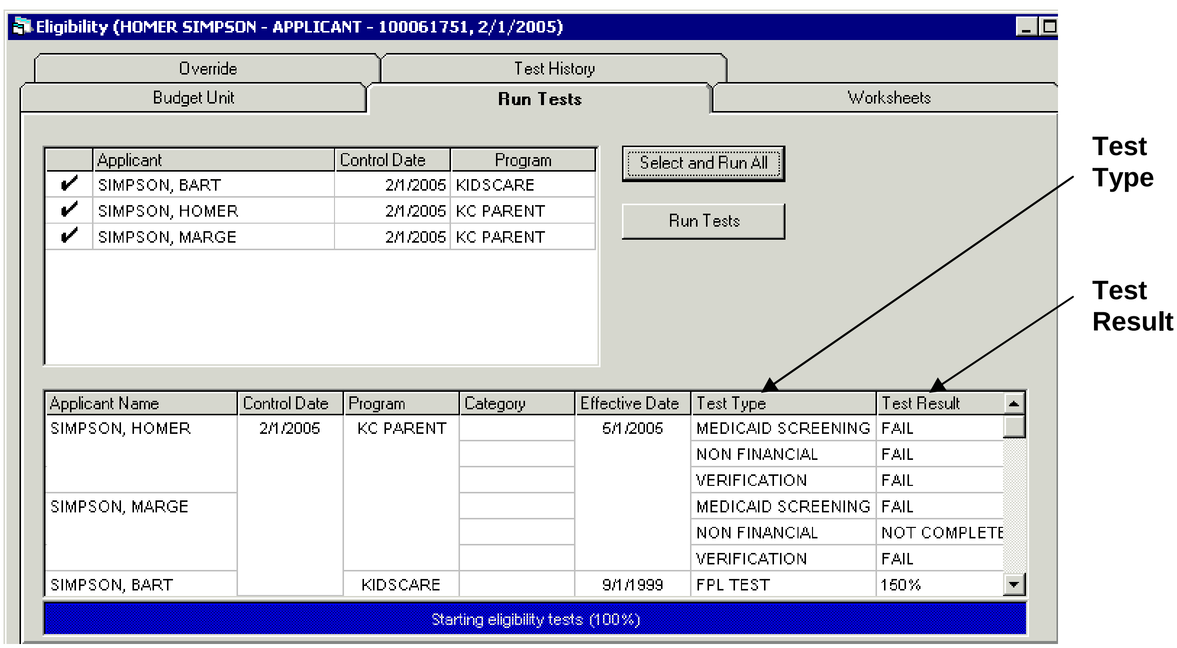
The **“Test Summary”** displays the following information:

Applicant Name	Displays the customer’s name.
Control Date	Displays the current control date.
Program	Displays programs for which the test ran.
Category	Displays the category under which the customer is eligible. **Note:** This field will only show underlying SOBRA Parent eligibility, if applicable.
Effective Date	Displays the eligibility effective date.



Test type Displays which test was run. (i.e. FPL Test, Income, Non Financial, Verification.)

Test results Displays the results of the test requested. (i.e. FPL level, Pass, Fail)



When ACE has completed the calculations, the results are displayed in **"Test Result"**, indicating if the customer will either "**PASS"**, **"FAIL"**, **"NOT COMPLETED"** (did not answer a question) or the percentage of the FPL in which the household income falls into.

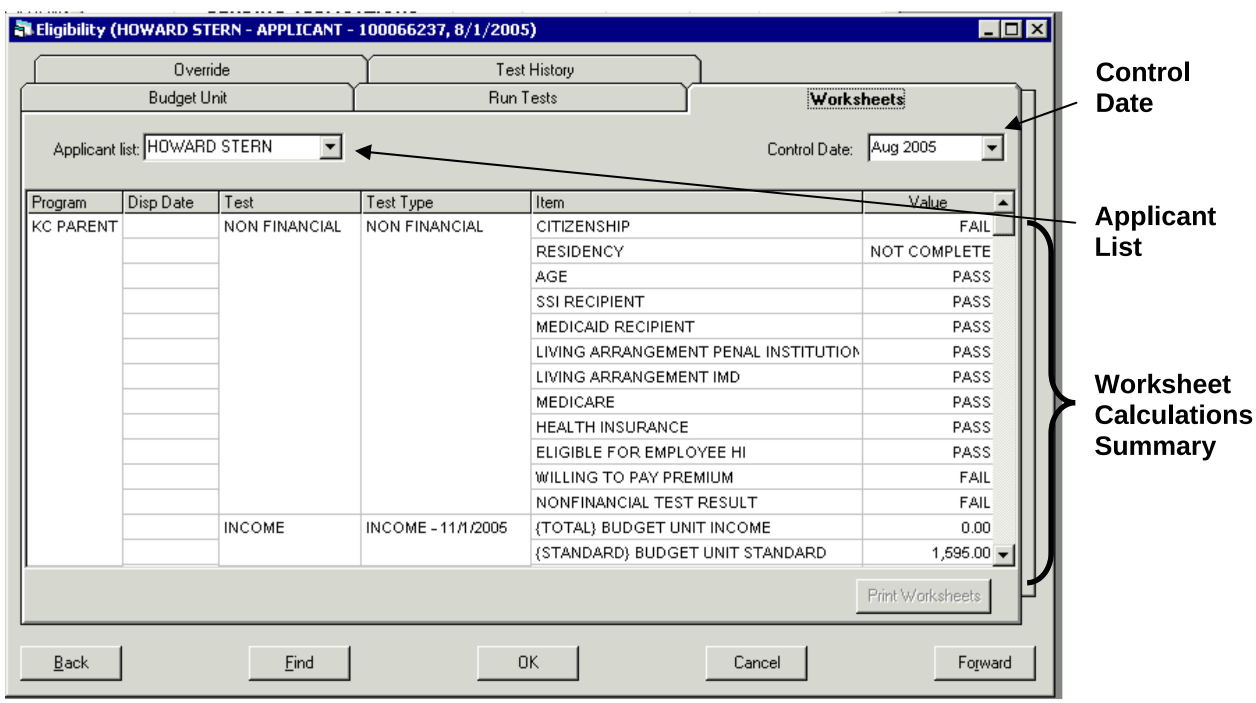
When you have reviewed all the results, click on the **“Forward”** button to continue to the next tab, **“Worksheets”**.

4. Worksheets

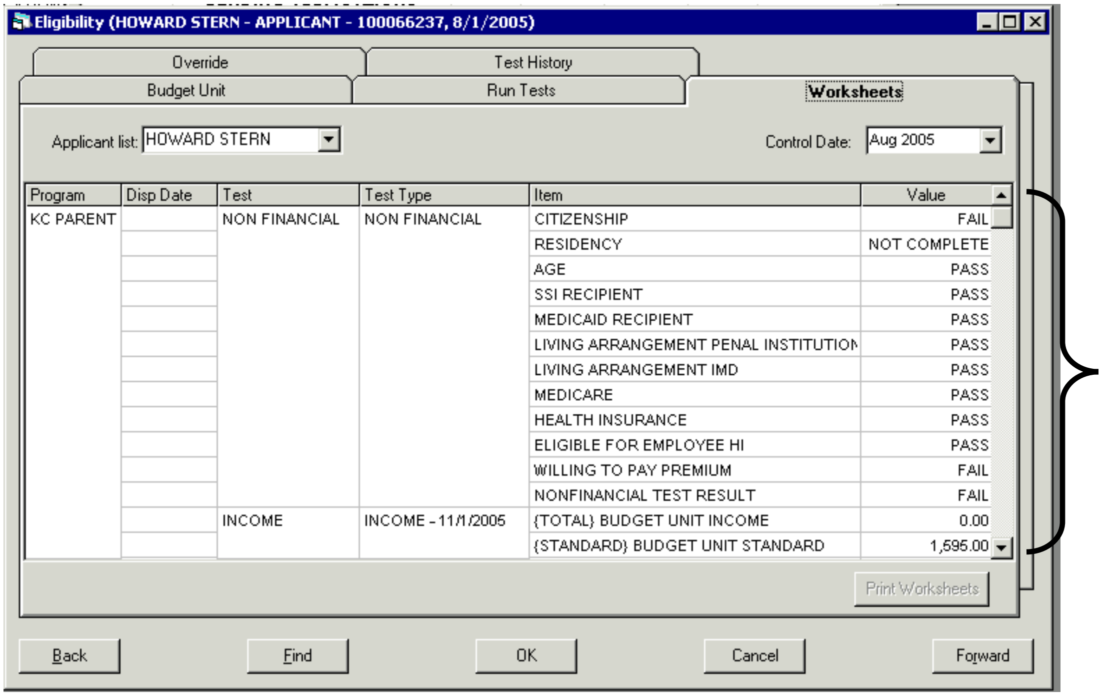
The **“Worksheets”** tab displays the eligibility test calculations and results.

There are three parts to this tab.

Applicant list	Displays the name of the applicants. To select another customer who is part of the same group, click on the ▼ (down arrow), and click on the other customer’s name.
Worksheet Calculations Summary	The **“Worksheet Calculations Summary”** displays financial, non-financial and Medicaid screening worksheets. Although no calculations are applicable, the non-financial worksheet displays all the non-financial items that are applicable for the program type; and it indicates a “pass/fail” status for each item. This enables you to quickly determine which of the non-financial items caused the non-financial test to fail, if any.



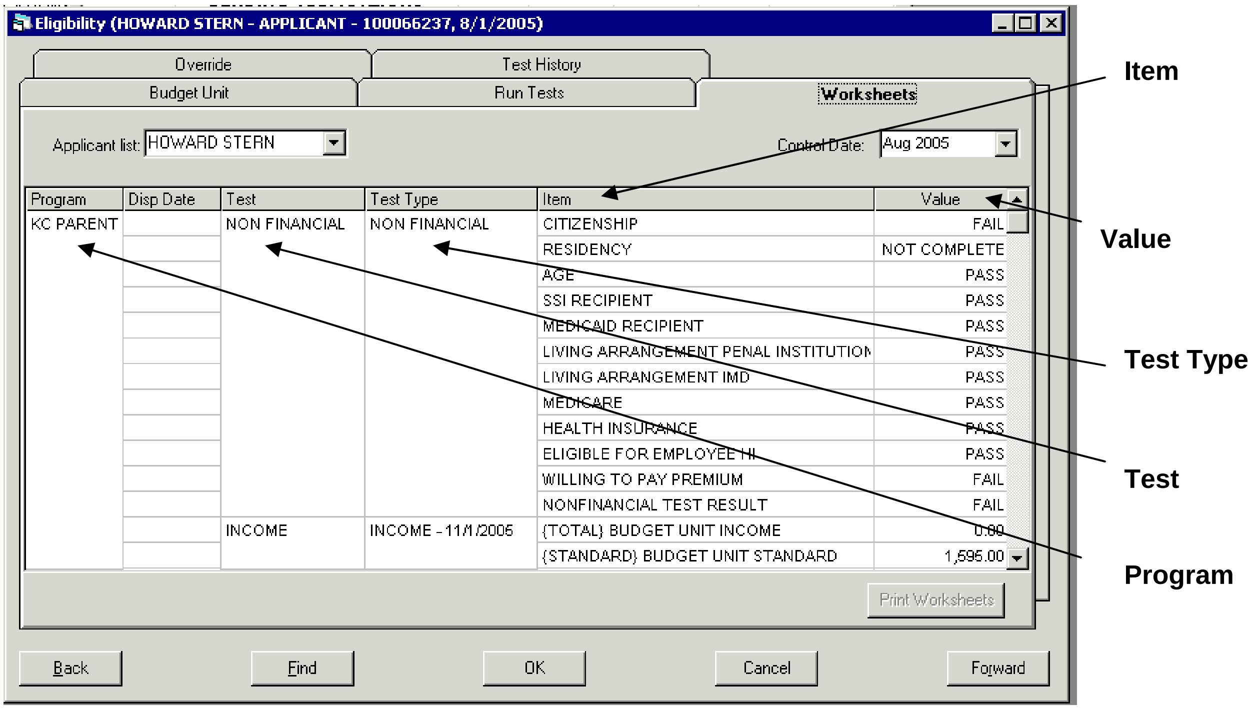
The vertical scroll bar allows you to view the full worksheet.



Vertical Scroll Bar

The worksheet displays the following:

Program	KidsCare/KC Parent
Test	Financial/Non-financial/Medicaid Screening/FPL/Premium
Test Type	Financial/Non-financial/Medicaid Screening/FPL/Premium
Item	Indicates the items the test reviewed
Value	Indicates the value amount of each item in the test (may include Pass/Fail/Not Complete/FPL Percentage).



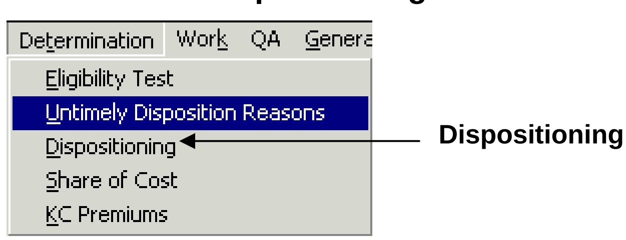
Each of the eligibility tests, both financial and non-financial have systematically calculated worksheets detailing what items are included in the test, and the detailed calculations. The worksheets are created whenever a test is run, and are available for review at any time. For control dates that are undispositioned, new worksheets are completed each time a test is run. ACE automatically determines the month the action becomes effective.

Click **OK** to close the window.

5. Disposition

After reviewing the worksheets and determining the calculations are correct, the next step is to disposition the case.

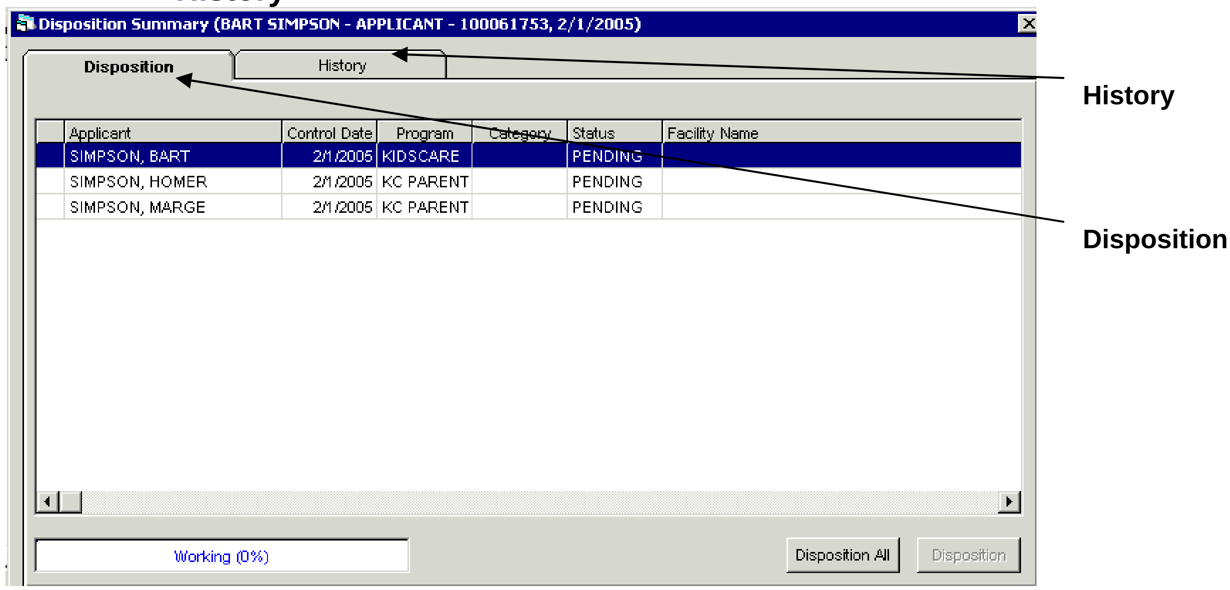
To complete the disposition process, use the **"Disposition Summary"** window. To travel to the **"Disposition Summary"** window, go to the main menu and click on **"Determination"**. From the drop down menu select **"Dispositioning"**.



This opens the **"Disposition Summary"** window.

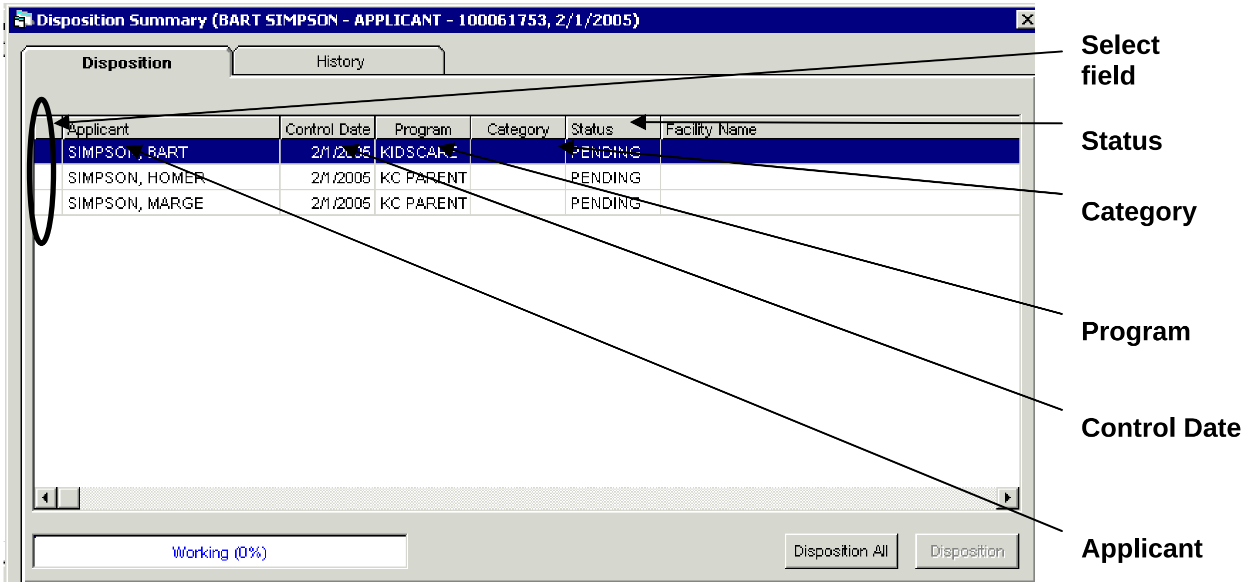
The **"Disposition Summary"** window has two tabs.

- **Disposition**
- **History**



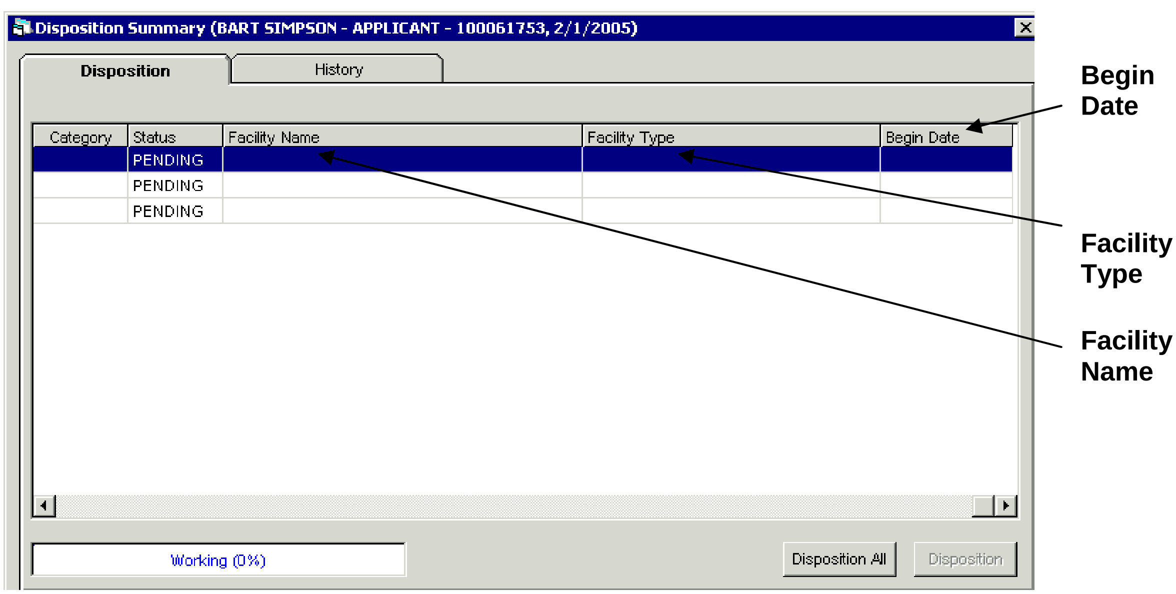
The **"Disposition"** tab contains the following fields:

Select field	Used to select which applicant you want to disposition.
Applicant	Displays the customer's name.
Control Date	Displays the control date to be dispositioned.
Program	Displays the programs to be dispositioned.
Category	Displays the category under which the customer is eligible (SOBRA Parent only).
Status	Displays the status of the case indicating the control date is not dispositioned.



To view the remaining tabs, use the horizontal scroll bar.

Facility name	Displays the facility. (For customers as entered on the "**Living Arrangement"** tab).
Facility type	Displays the facility type. (For customers as entered on the **"Living Arrangement"** tab).
Begin date	Displays the begin date entered on the **"Living Arrangement"** detail window.

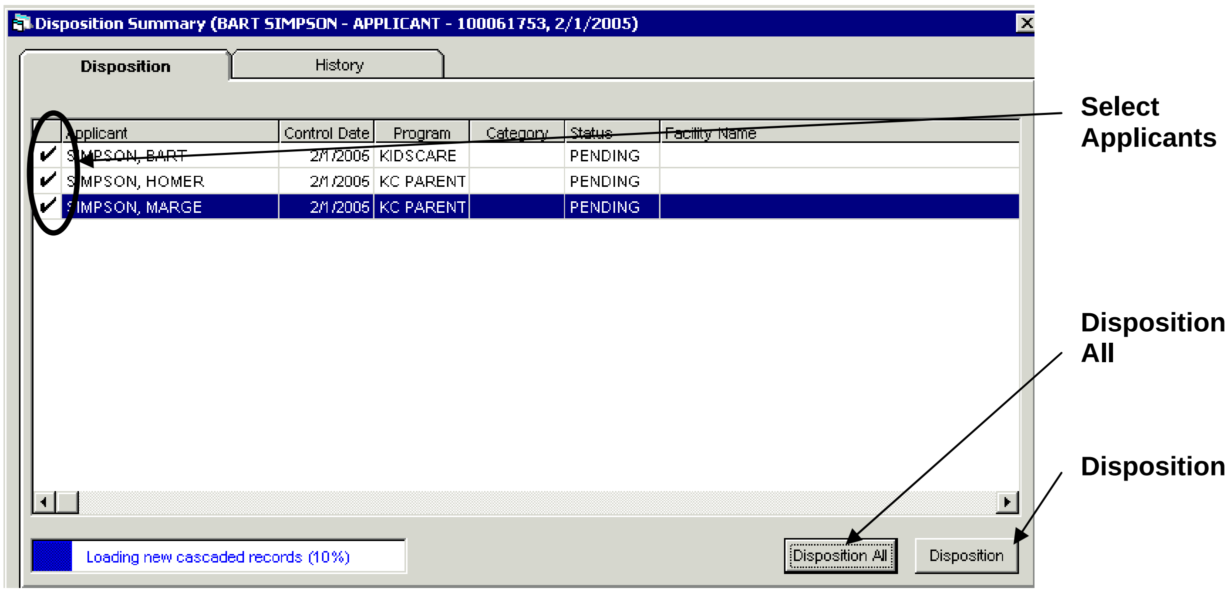


There are also two buttons located on the **"Disposition tab"**:

Disposition All	Used when dispositioning all applicants.

Disposition	Used when dispositioning only one particular applicant. This option is only available on initial applications.

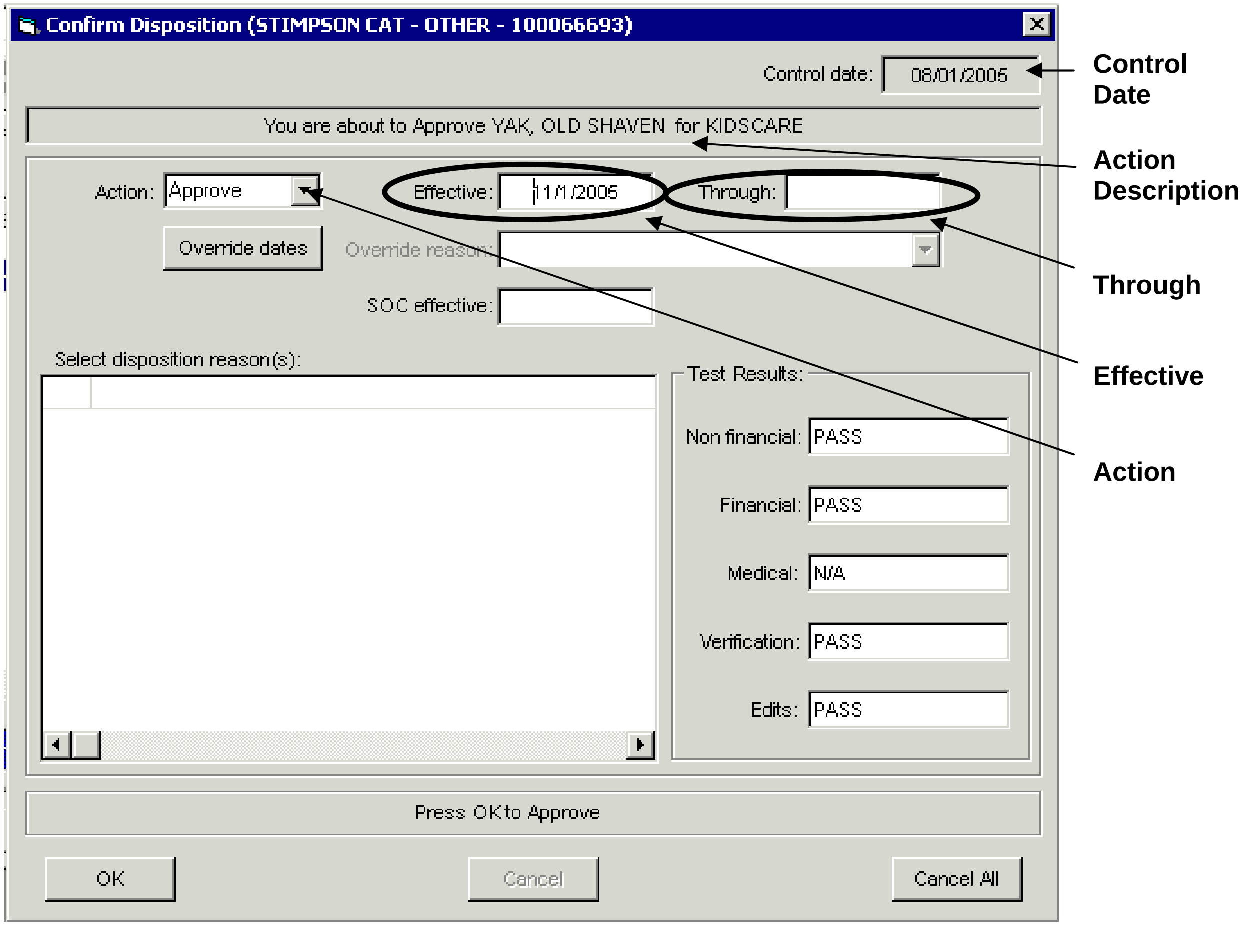
To disposition the case, select the applicant(s) you wish to disposition. To select an applicant(s), place the cursor in **"Select field"**, and click. If you are dispositioning more than one applicant, select by placing the ✓ (check mark) in each of the **"Select"** fields.



To disposition the applicant, select either **"Disposition"**, or **"Disposition All"** which will automatically select all applicants that are pending, and allow you to disposition in the correct order.

The **"Confirm Disposition"** window appears. This window has the following fields:

Control date	ACE automatically displays the control date being dispositioned.
Action description	ACE displays a message related to the action completed by this disposition. In the example below the message reads: **You are about to Approve YAK, OLD SHAVEN for KIDSCARE.**
Action	Describes the action being taken, (Approve/Deny/Change/Discontinue).
Through	Not used for KidsCare.
Effective	Displays the date the action became effective.

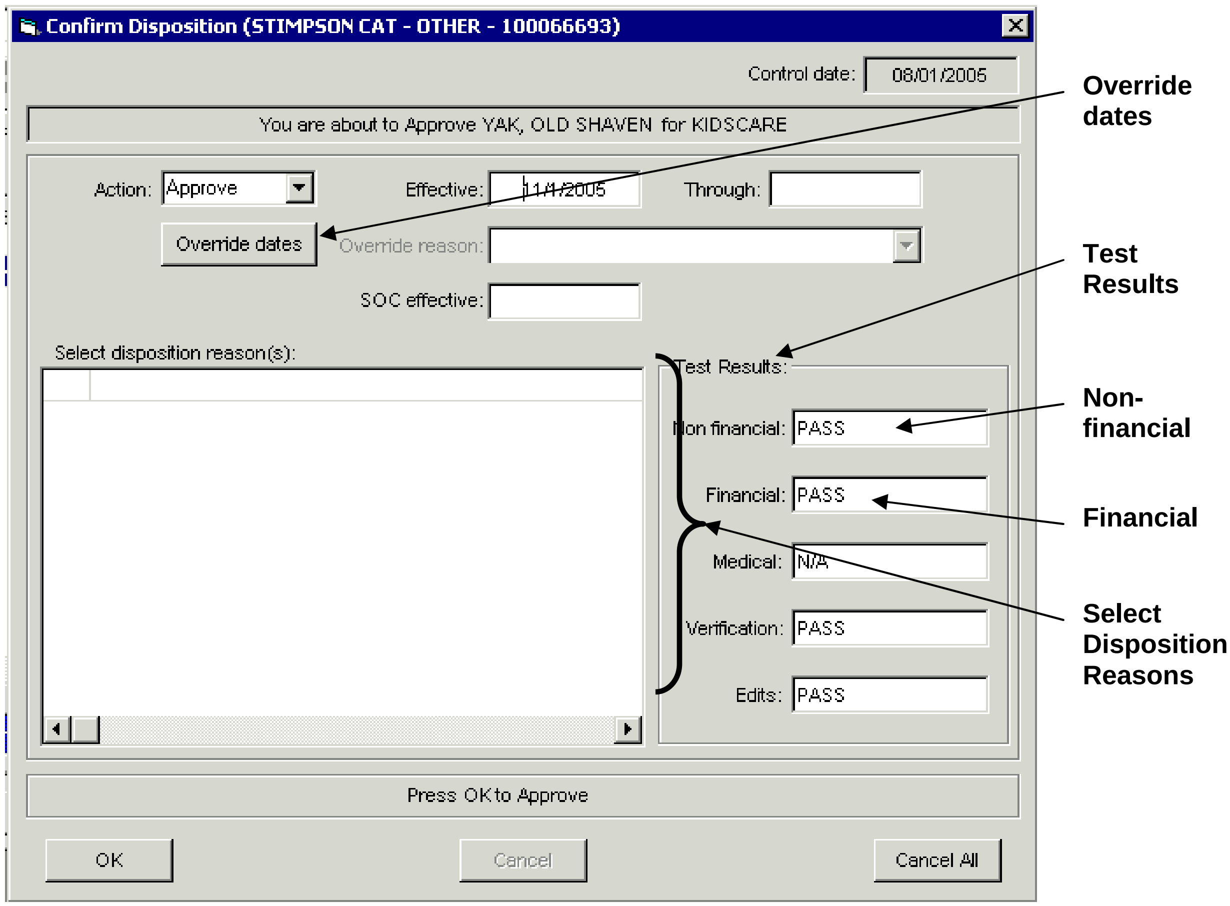


Override dates	This is a protected field used by supervisors only. Displays the new effective date.
Override reason	Displays the reason for the override.
Select disposition reason(s)	For denials or discontinuances, the list of appropriate reasons for the action is displayed. You may select more than one reason. If there are multiple reasons why a case is ineligible, select *all the reasons that apply*.

There is one grid on the **"Confirm Disposition"** window, **"Test Results"**. This grid has the following fields:

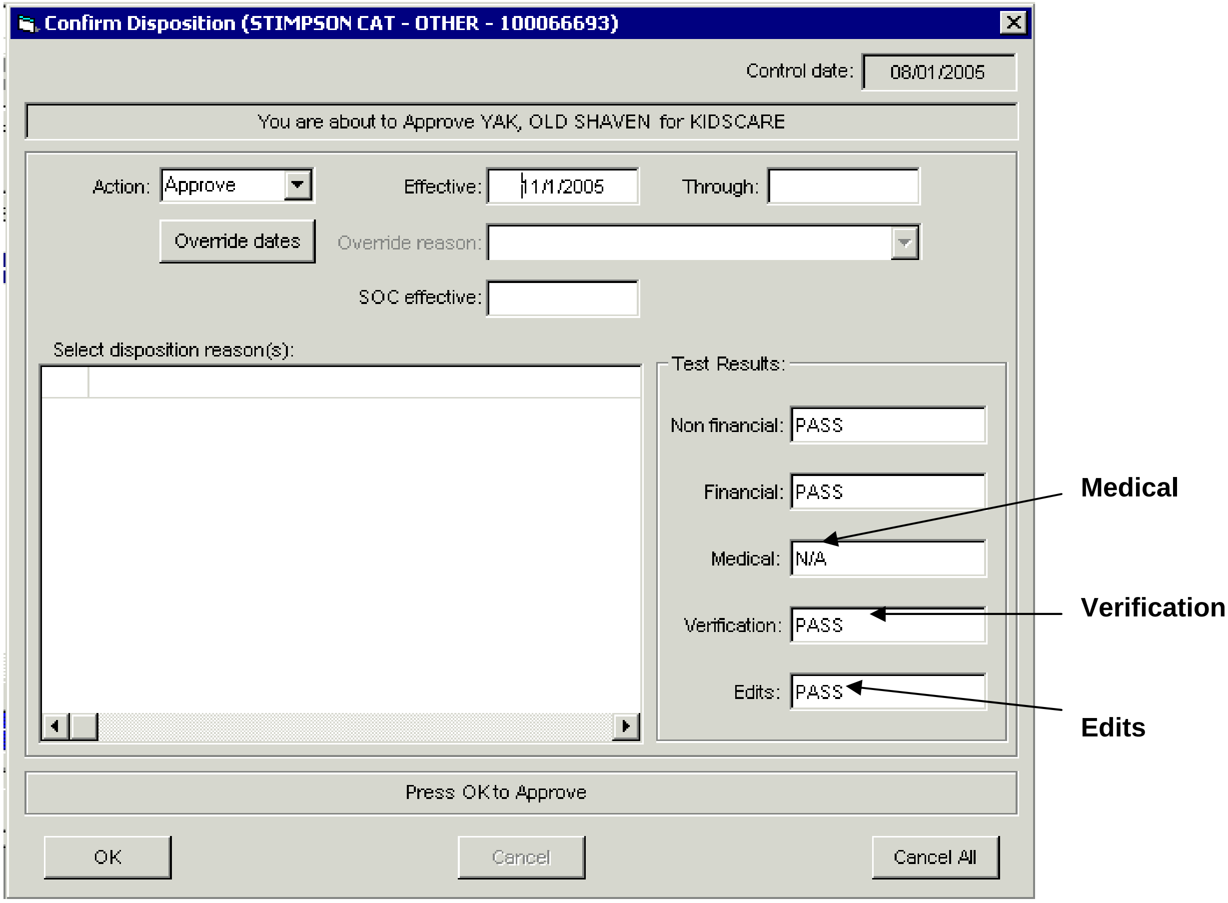
Non-financial	Displays the results of the test for the non-financial criteria (i.e. Health Insurance or Citizenship).

Financial	Displays the results of the test for the financial criteria.



Medical	This field relates to the ALTCS medical assessment only. For KidsCare, this field will display **"N/A"** (Not Applicable).
Verification	Displays the results of the test for the mandatory verification criteria.
Edits	Displays the results of the test for the edits.

!	**Note:** If you did not resolve all edits prior to disposition, ACE will automatically display **"FAIL"** in this field.



Click **OK** to approve.

6. Denial Disposition Example

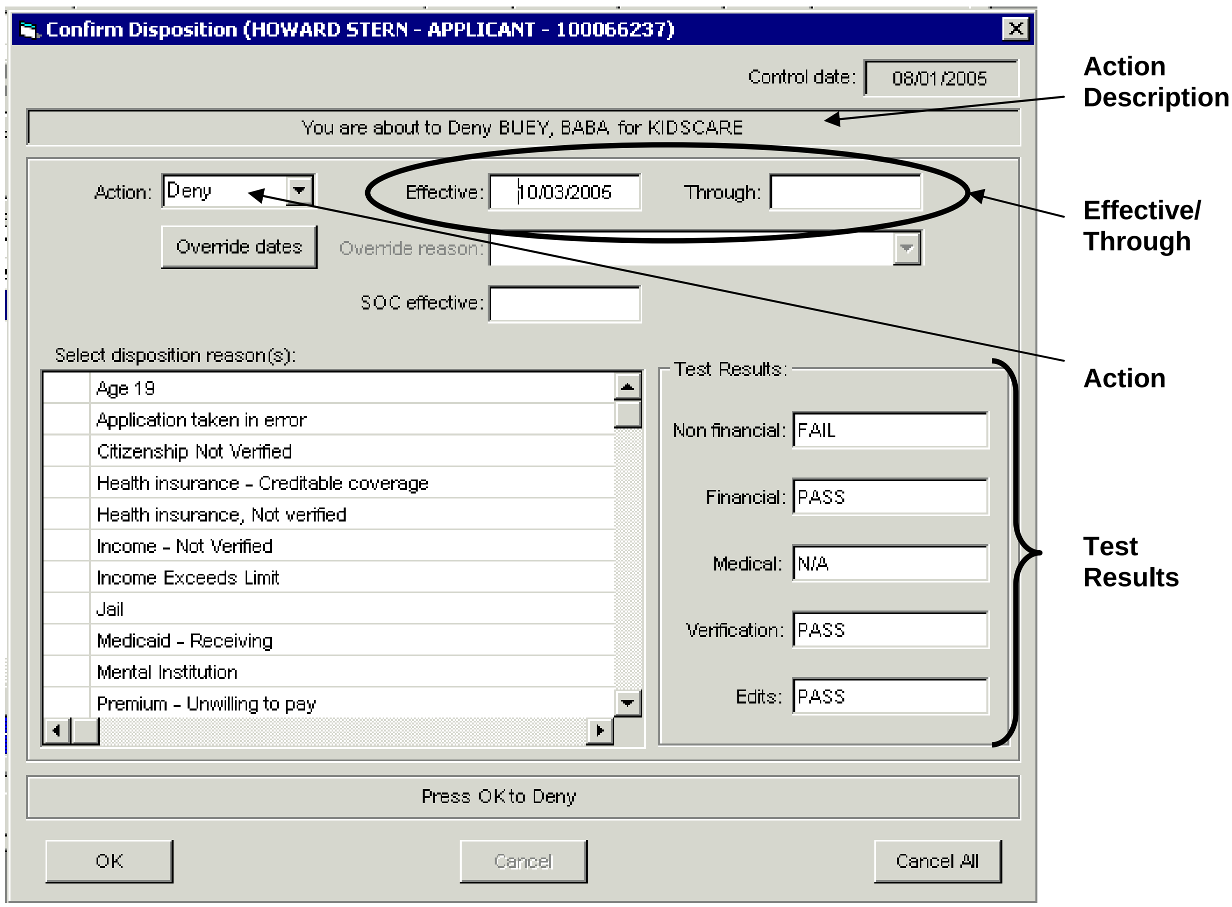
The **"Confirm Disposition"** window contains the following information in each field:

Action Description	You are about to Deny BUEY, BABA for KIDSCARE.
Action	Deny
Effective	10/03/2005
Through	(blank)
Select disposition reason(s)	Displays several reasons from which to choose.

The **"Test Results"** grid displays the following:

Non-financial	PASS

Financial	FAIL
Medical	N/A
Verification	PASS
Edits	PASS



7. Change Disposition Example

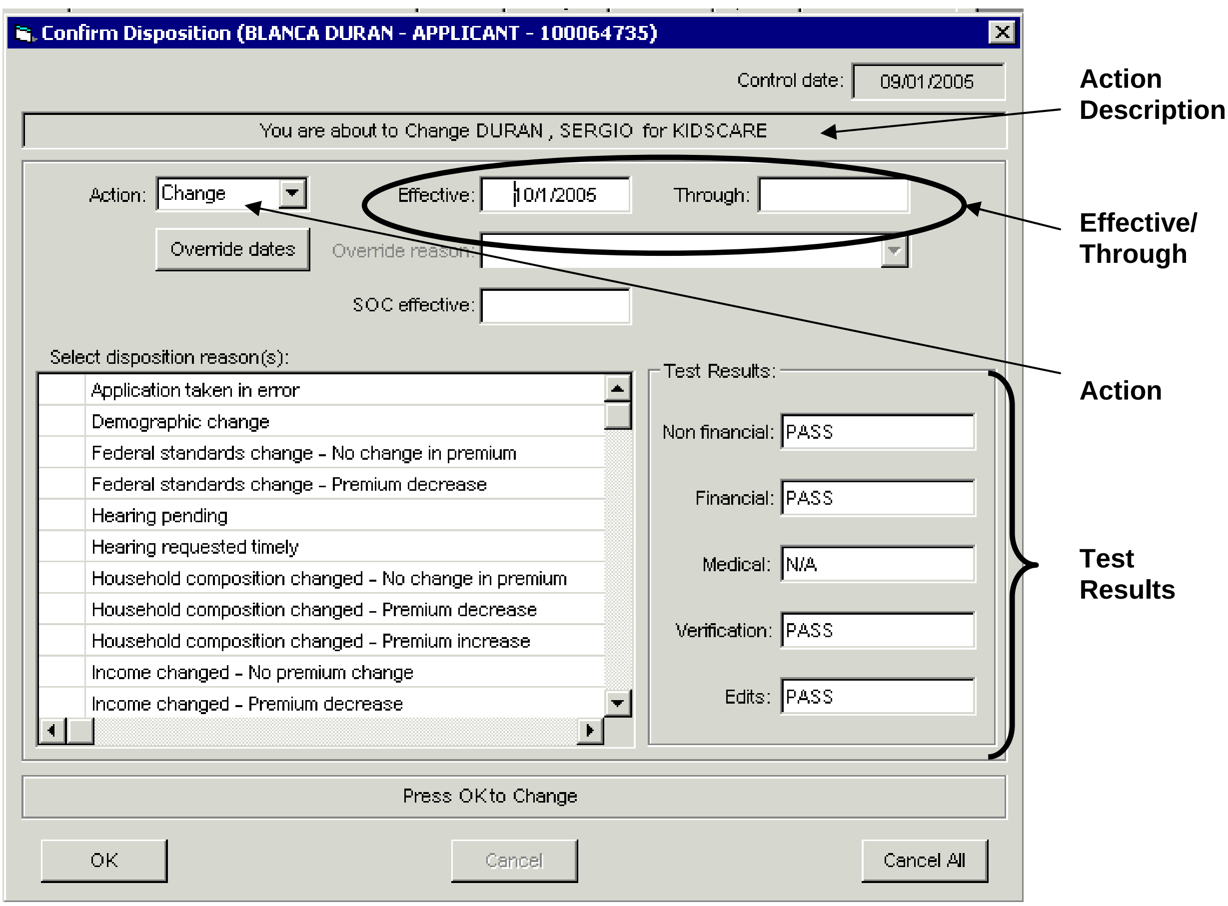
The **"Confirm Disposition"** window contains the following information in each field:

Action Description	You are about to Change SIMPSON, BART for KidsCare
Action	Change
Effective	06/01/2005
Through	(blank)

Select disposition reason(s)	Displays several reasons for the change.

The **"Test Results"** grid displays the following:

Non-financial	PASS
Financial	PASS
Medical	N/A
Verification	PASS
Edits	PASS

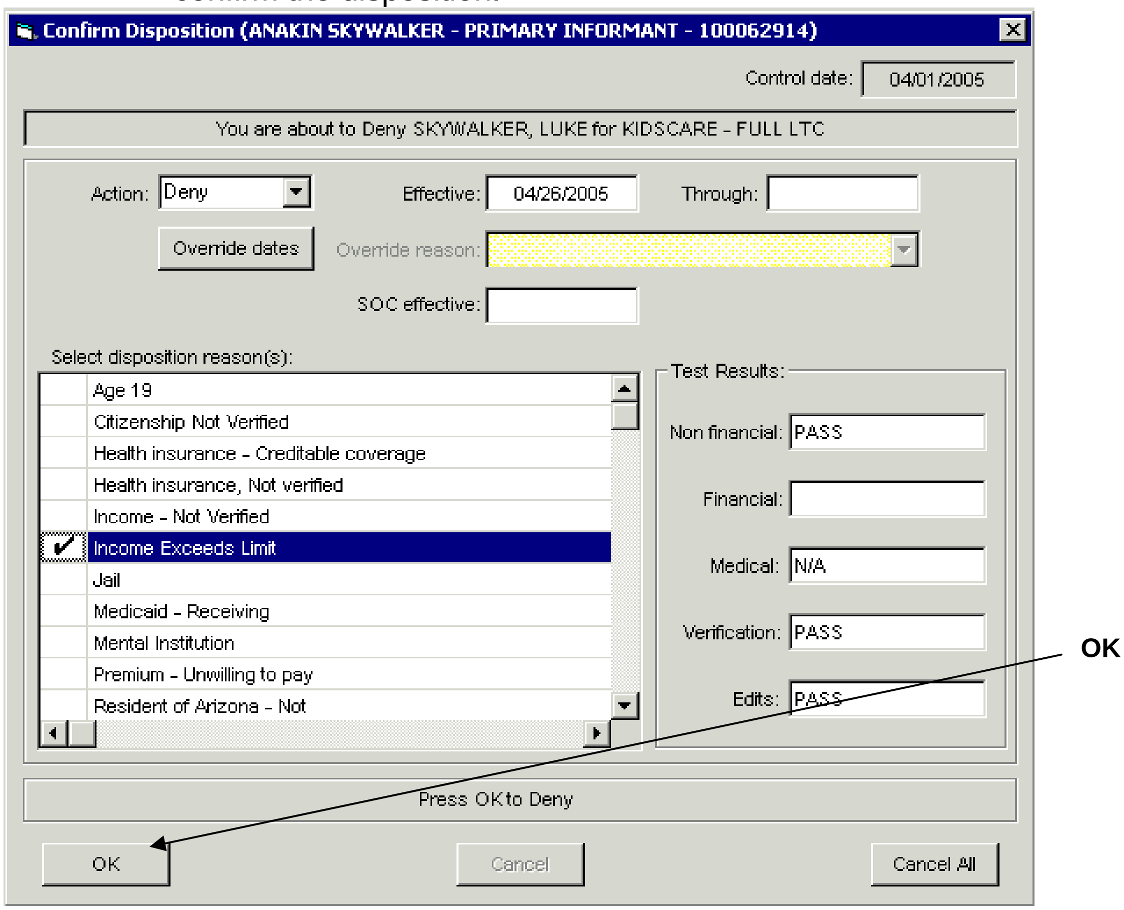


8. Disposition Process

To complete a change, approval, discontinuance, or denial, take the following steps:

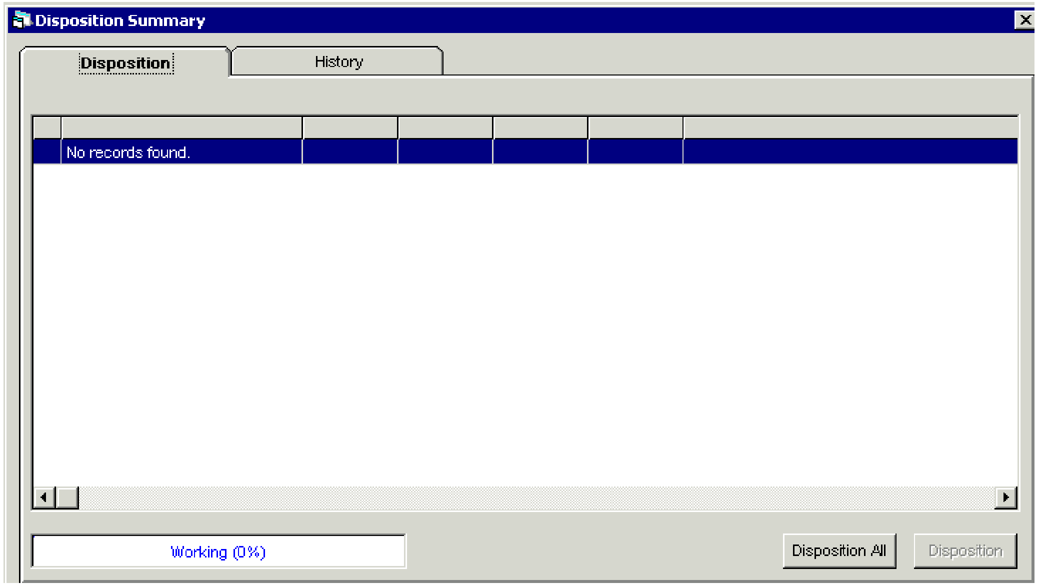
- Check the **"Control date"**.
- Read the **"Action Description"** (make sure it is the action you anticipated).

- Check the **“Action”**.
- Check the **“Effective”** date(s).
- If the case is being denied, changed or discontinued, select the disposition reason(s). In the example below, the reason for denial is **“Income Exceeds Limit”**.
- After you review and determine that this is the action you anticipated and select the disposition reason(s), click **“OK”** to confirm the disposition.



When you click **“OK”**, the **“Confirm Disposition”** window closes.

When the **“Confirm Disposition”** window closes, you again see the **“Disposition”** tab. In the example below, there are no other applicants to disposition. However, if there were additional applicants to disposition, they would be displayed.



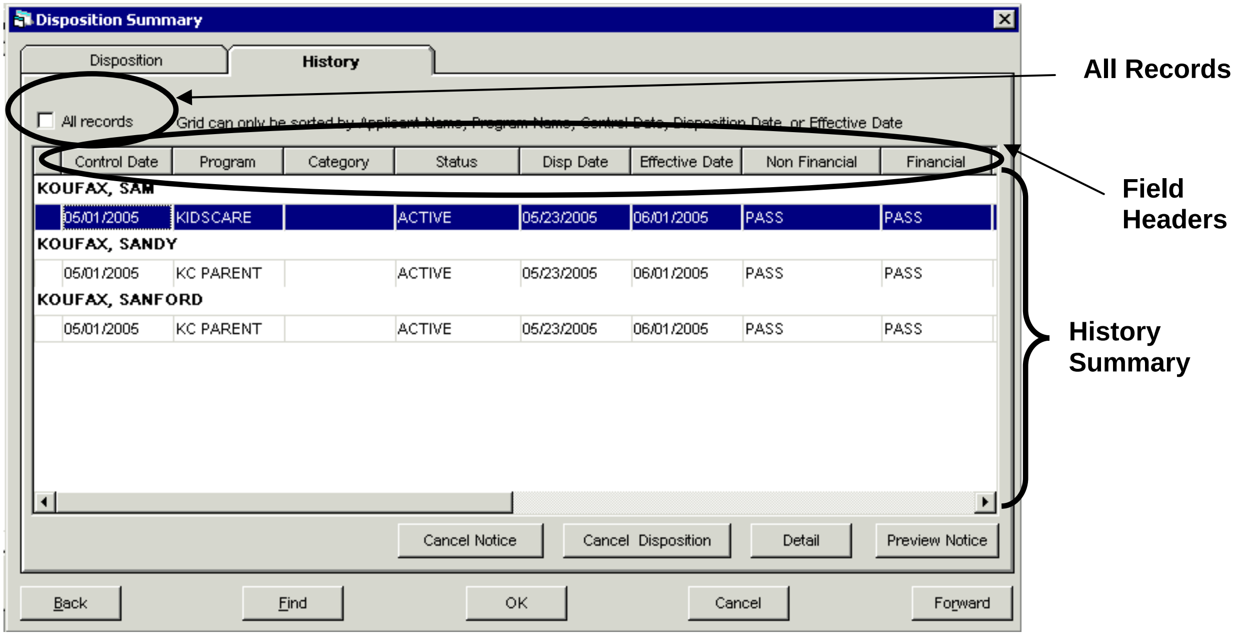
To see the results of the disposition, click on the **"History"** tab.

9. History

The **"History"** tab stores all disposition history in ACE. The **"History"** tab contains the following:

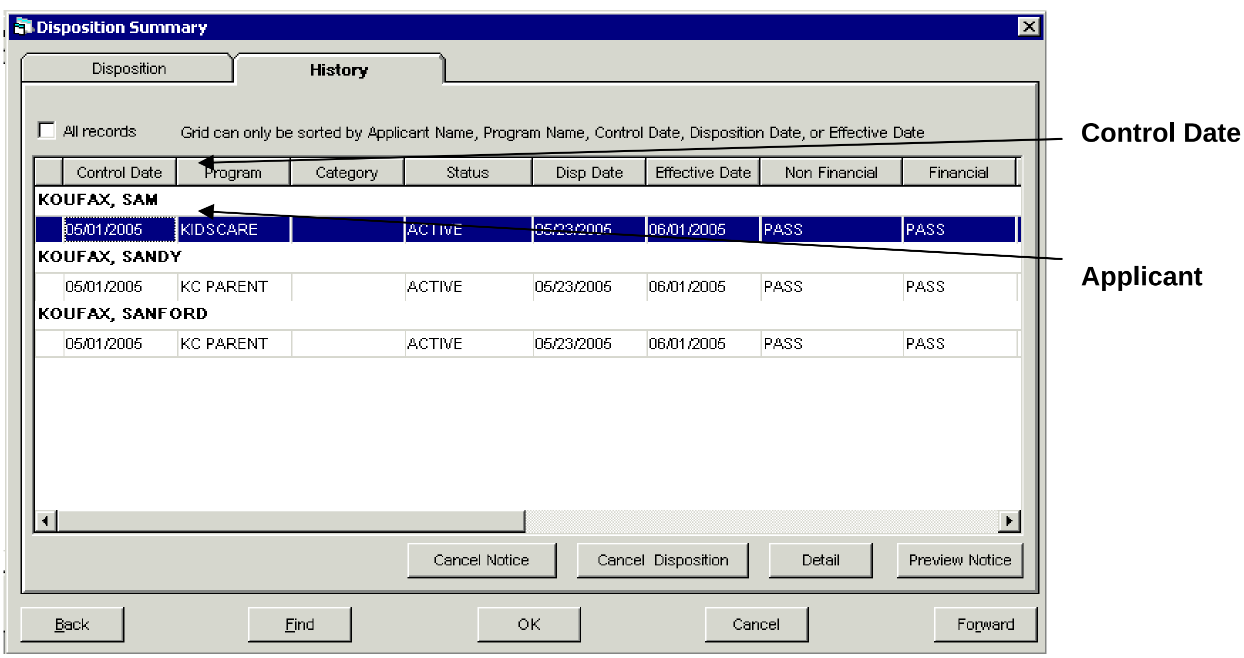
All records	When a ✓ (check mark) is in the ❑ (box,) all control dates are displayed, both dispositioned and undispositioned. Otherwise, only the current disposition control date is displayed.
History Summary	Displays a summary of dispositions.

The Applicant, Program, Control Date, Effective Date and Disposition Date fields on the screen can be sorted by clicking on field headers at the top of the **"History Summary"**.



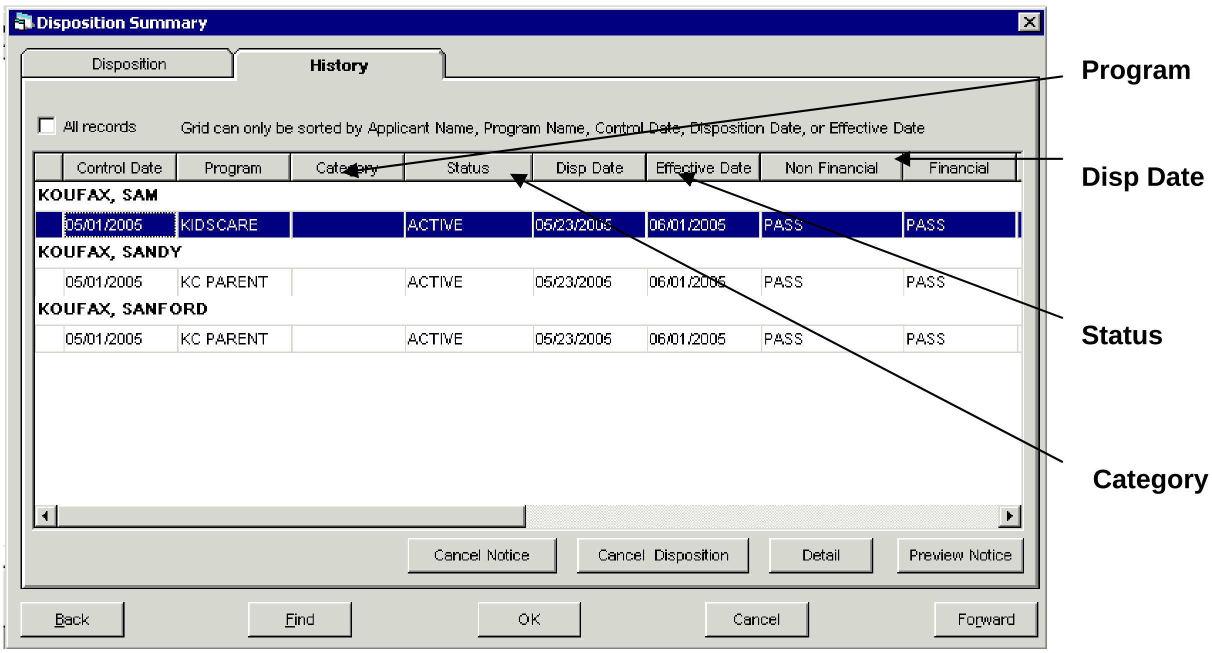
The **"History Summary"** grid contains the following fields:

Applicant	Displays the customer's name.
Control Date	Displays the control date of that specific disposition.

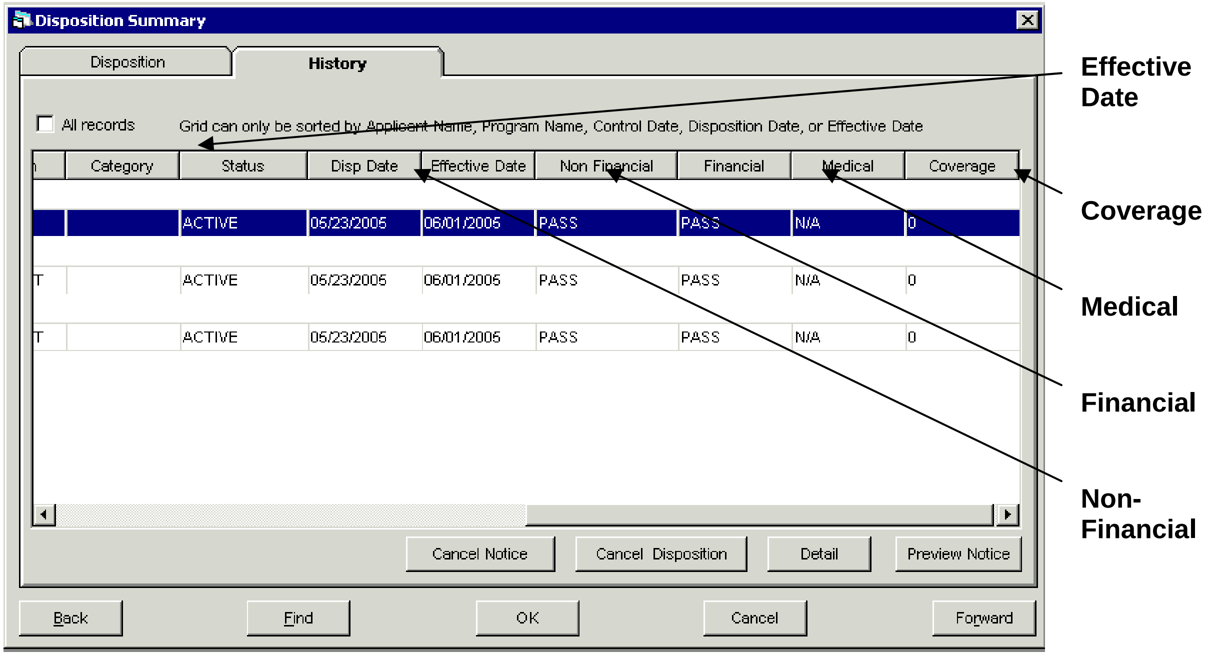


Program	Identifies the program that was dispositioned for the specific control date.

Category	Displays the category under which the customer is eligible. **Note:** This field will only show underlying SOBRA Parent eligibility, if applicable.
Status	Displays the status of the disposition (pending, active, denied, and discontinued).
Disp Date	Displays the date of the disposition.



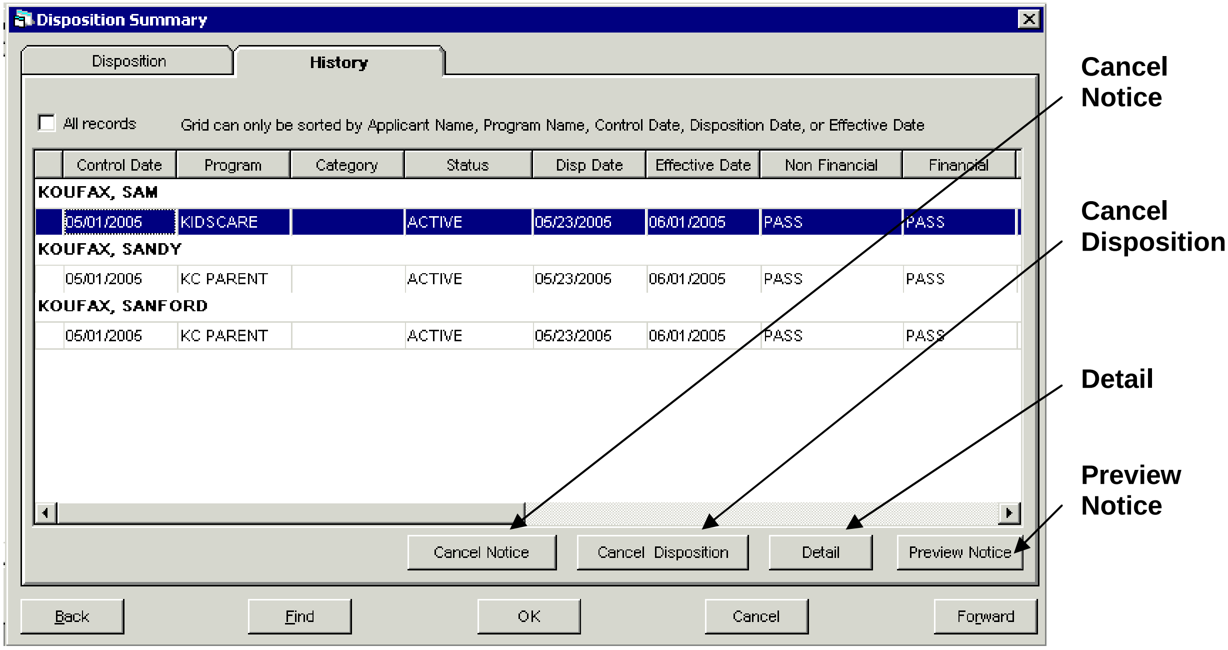
Effective Date	Displays the date the action is effective.
Non-financial	Displays the results of the non-financial test, for example, citizenship.
Financial	Displays the results of the financial test.
Medical	Not used for KidsCare.
Coverage	Not used for KidsCare.



The **"History"** tab displays the dispositions that have occurred for a particular case.

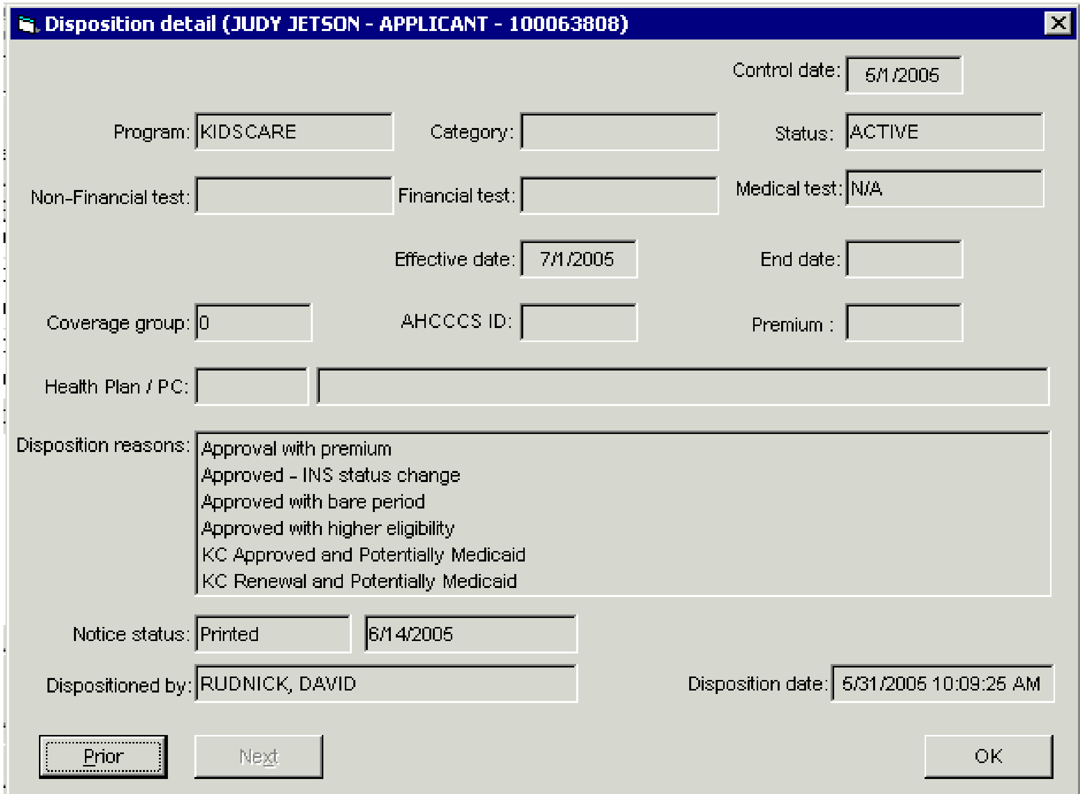
At the bottom of the **"History"** tab, there are four buttons.

Cancel Notice	Allows you to cancel the notice when the notice does not match the eligibility decision. Once this option is selected, the **Cancel Notice** button changes to **Reactivate Notice**.
Cancel Disposition	Allows you to cancel the disposition, but only the same day you have dispositioned the case. If the disposition was completed prior to the current date, a re-open is required.
Detail	Allows you to view the details of the disposition. To view the details, select an entry by placing the cursor over the entry and click on it, causing it to be highlighted. Click on the **"Detail"** button. A description of the **"Disposition detail"** window begins on the following page.
Preview Notice	Allows you to view the notice being generated by the disposition.



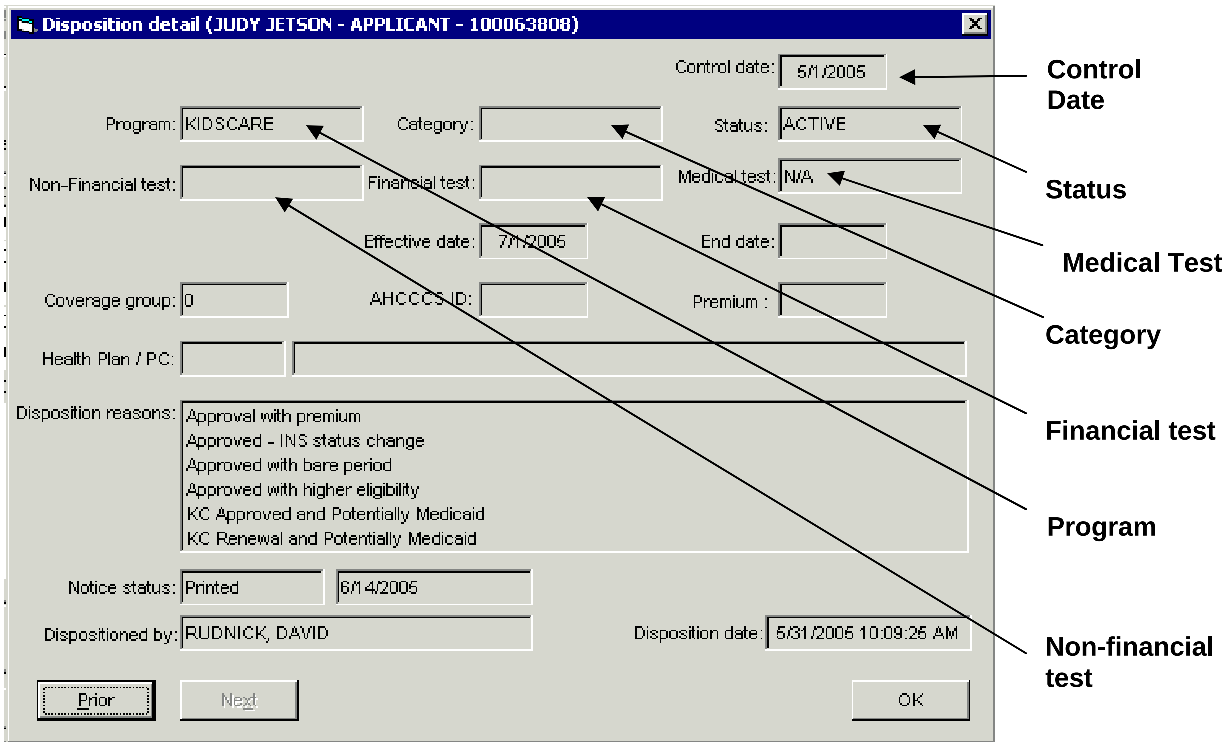
The **"Disposition detail"** window contains the following information:

- **Control Date**
- **Program**
- **Category**
- **Status**
- **Non-Financial Test**
- **Financial Test**
- **Medical Test**
- **Effective Date**
- **End Date**
- **Coverage Group**
- **AHCCCS ID**
- **Premium**
- **Health Plan/PC**
- **Disposition Reasons**
- **Notice Status**
- **Dispositioned By**
- **Dispositioned Date**

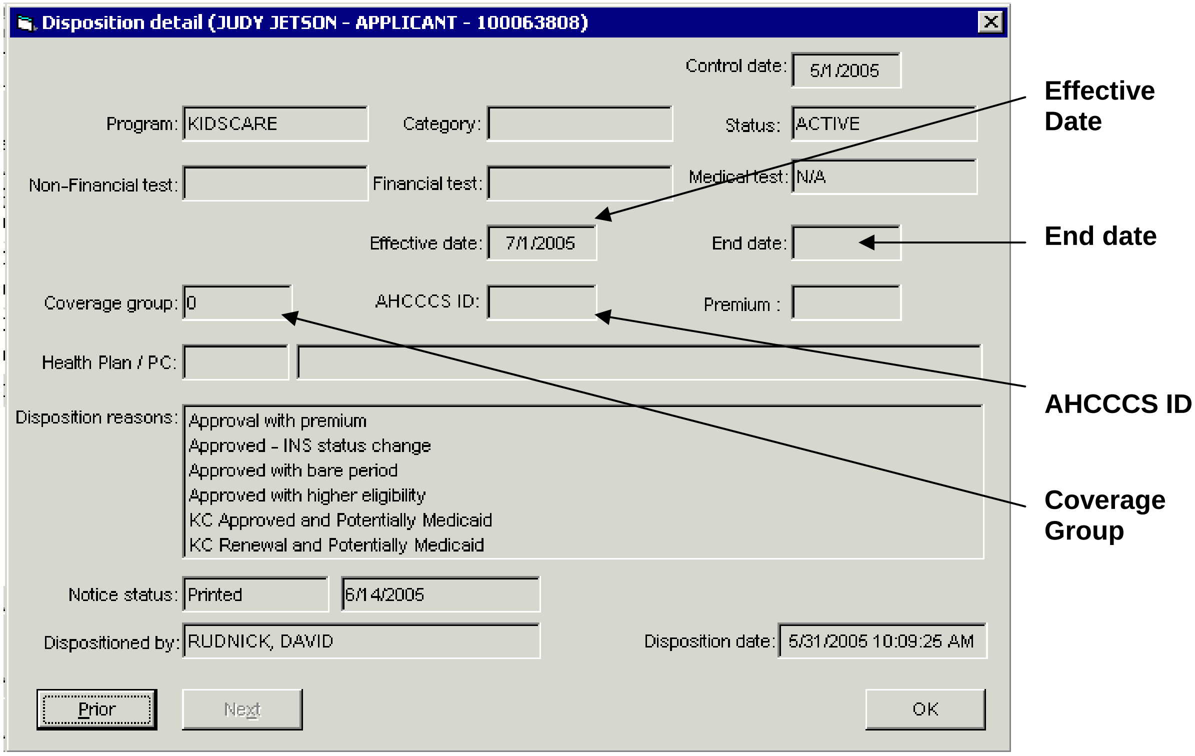


A description of each of these fields follows.

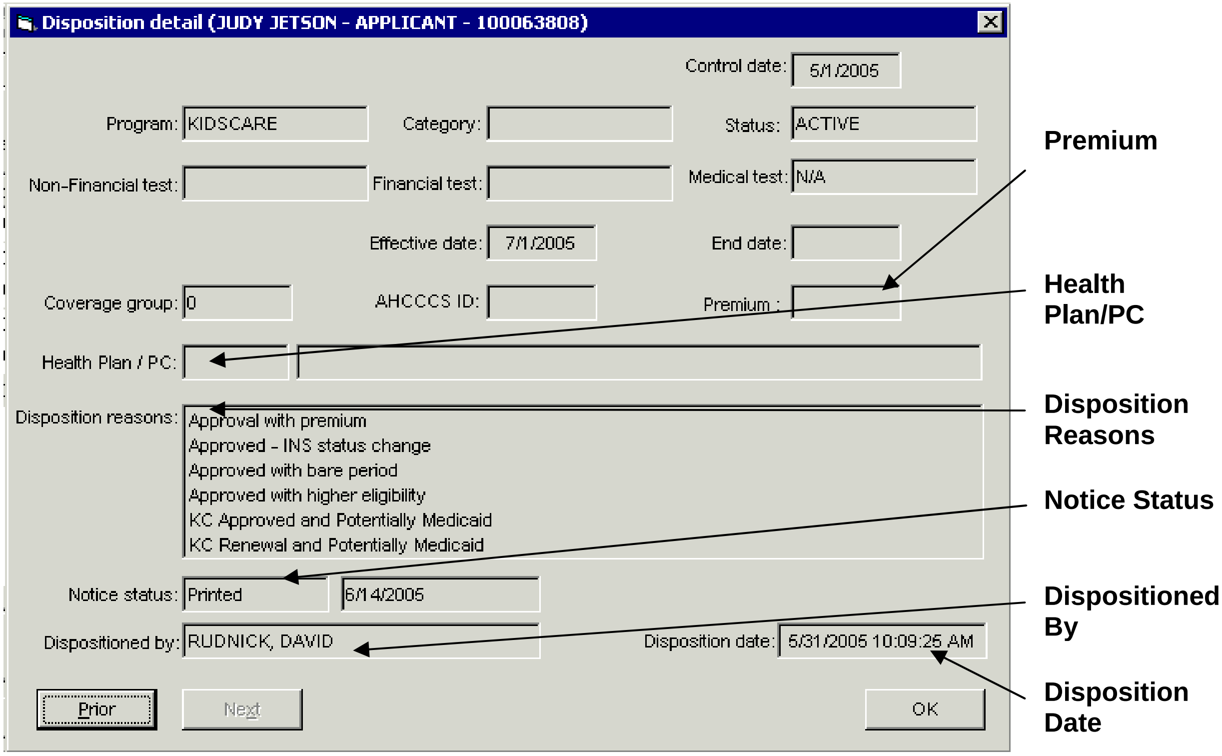
Control date	Displays the control date for that disposition.
Program	Displays the program dispositioned.
Category	Displays the category under which the customer is eligible (Only underlying SOBRA Parents).
Status	Displays the status of the case as a result of that disposition.
Non-financial Test	Displays the results of the non-financial test.
Financial Test	Displays the results of the financial test.
Medical Test	Displays the results of the medical test. **Note:** This does not apply to KidsCare.



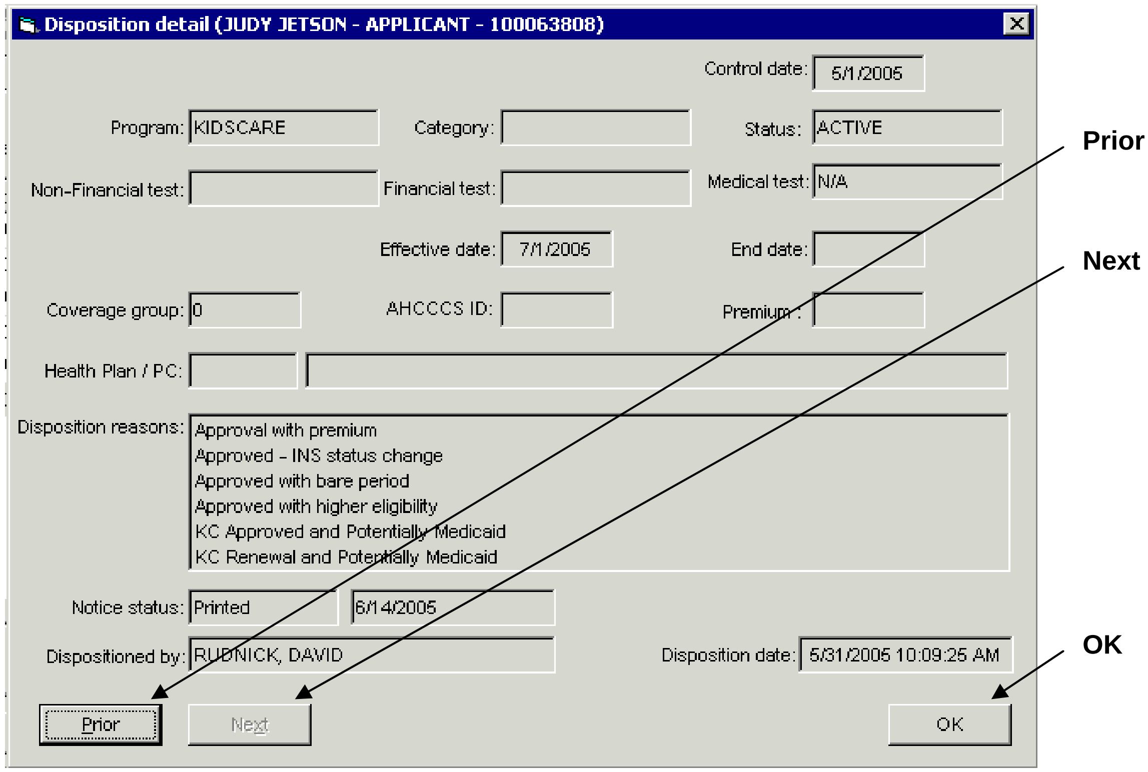
Effective date	Displays the date the action is effective.
End date	Displays the date the action ends.
Coverage group	Displays the coverage group.
AHCCCS ID	Displays the identification number assigned to the customer in PMMIS.



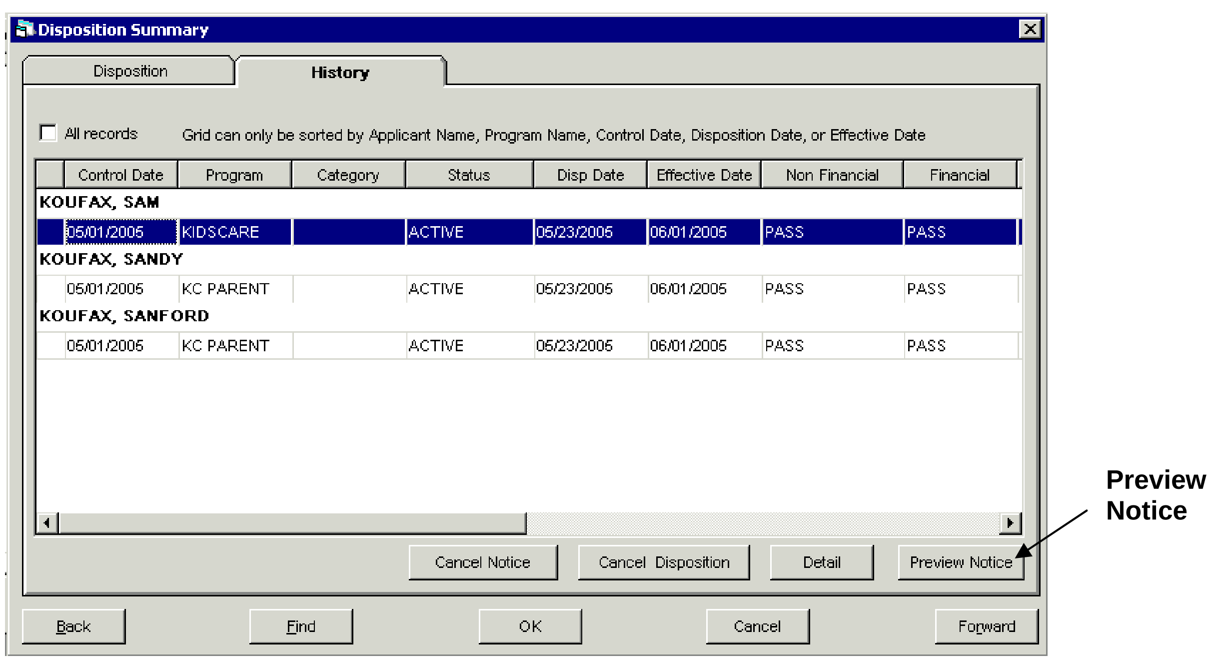
Premium	Displays the amount the customer must pay for their premium.
Health Plan/PC	Displays the health plan when the customer is eligible for KidsCare.
Disposition reasons	Displays the action taken.
Notice Status	Displays the status of the notice.
Dispositioned by	Name of the individual who dispositioned the customer.
Disposition date	Date the customer was dispositioned.



Prior	Shows you the detail of the previous disposition.
Next	Shows you the detail of the next disposition.
OK	Closes the screen.



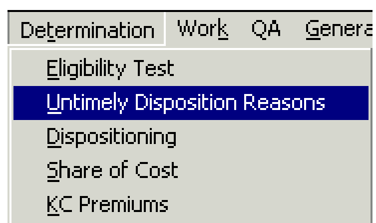
The **"Preview Notice"** button allows you to view the notice prior to its being mailed. It is important that each notice be reviewed for accuracy. To view the notice being generated from the disposition, click on the **"Preview Notice"** button.



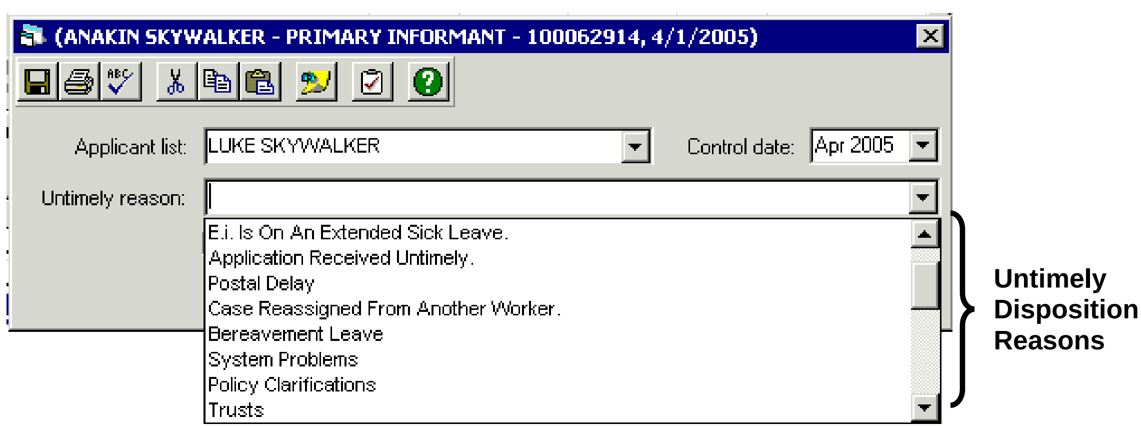
10. Untimely Dispositioning

When dispositioning a case that is overdue (after 30 days from the application date), you will need to enter a reason why the case is being dispositioned late. When you try to disposition a case, the message, **"This case has pended for more than 30 days. Do you want to disposition it without a good cause reason?"** Click **"No"**.

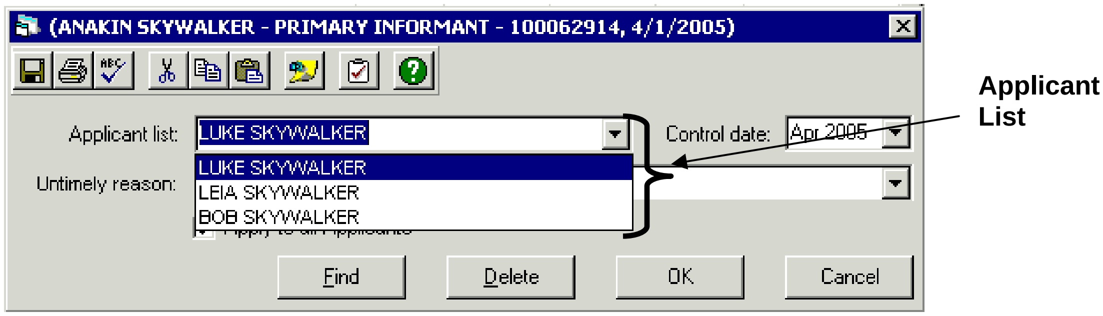
To access the **"Untimely Disposition"** window on the main menu, click **"Determination"**. On the drop down menu, select **"Untimely Disposition Reasons"**.



This will bring up the **"Untimely Disposition"** window. Click on the ▼ (down arrow) and select the appropriate reason for the case being untimely.



If any applicants have different untimely disposition reasons, uncheck the **"Apply to all Applicants"** field. Continue to select the appropriate untimely disposition reason for the rest of the applicants in the household. To select another applicant, click on the ▼ (down arrow), and click on the other applicant's name.



Once all applicants have been completed click **"OK"** and disposition the case.